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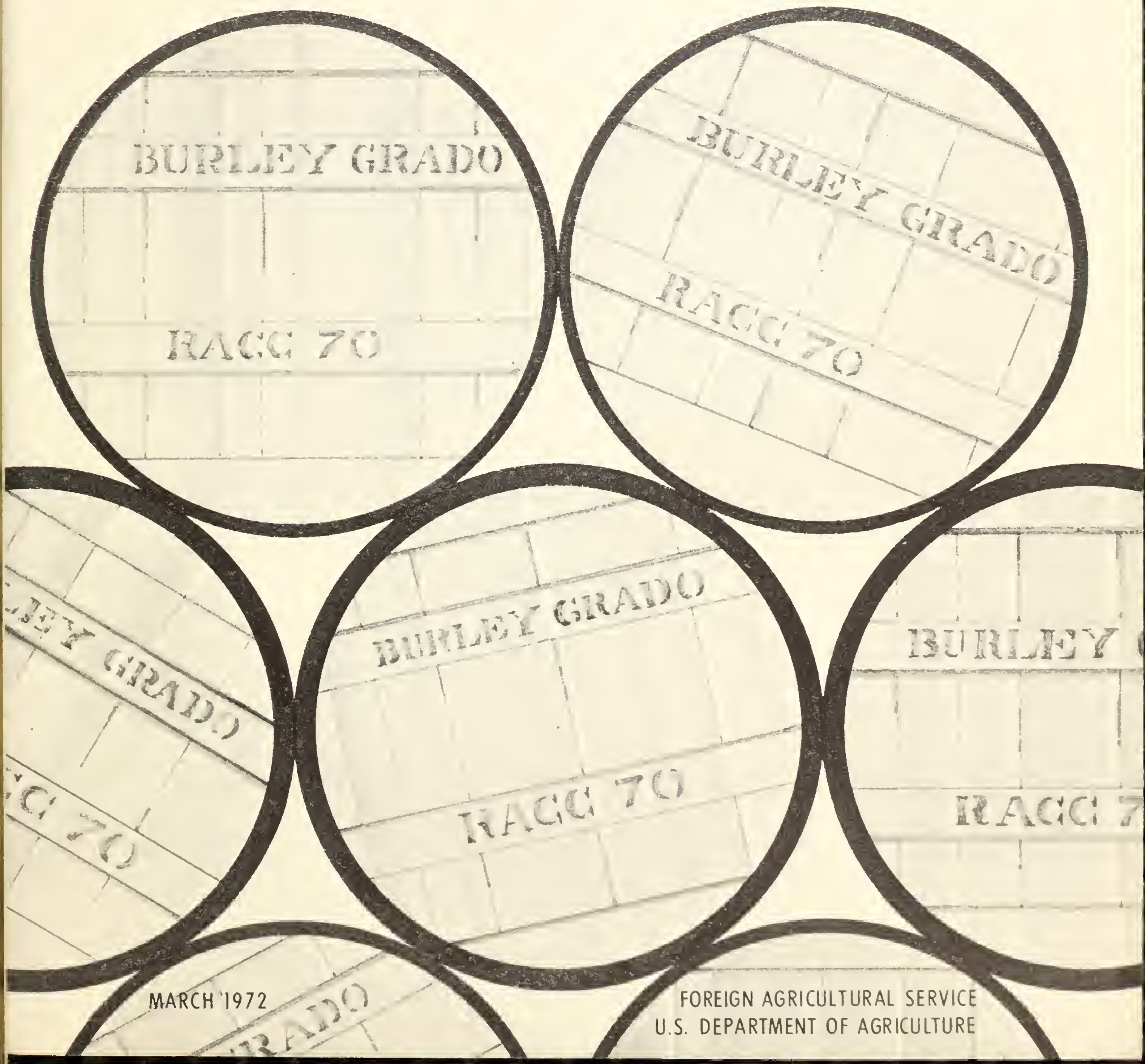
# ITALY'S CHANGING TOBACCO INDUSTRY

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# PREFACE

Italian agriculture is characterized by large numbers of very small farms and few extensive properties. Much of agriculture is technically advanced and farming is intensive. Agriculture employed about 3.7 million workers, or 18 percent of the labor force, and contributed 10.3 percent of the country's gross national product in 1970.

Grapes account for the largest amount of tonnage of crop production, with Italy being the world's largest wine producer. Sugar beets are second, wheat is third, and corn, fourth. Following is 1970 production of these major crops in thousands of metric tons: grapes—11,000; sugar beets—10,000; wheat—9,437; and corn—4,801.

Italy does not produce all the food it needs and has had increasingly large agricultural trade deficits in recent years. The 1969 deficit was $1.2 billion. Imports of live animals and meat represent about half of this trade deficit, or about $1.9 million per day.

Tobacco, which is a labor intensive crop, has been ideally suited to Italy's surplus labor situation, if not to the Italian soil and climate. But the labor situation is changing. The number of agricultural workers employed has dropped steadily since the early 1960's because of better employment opportunities either in Italy or in other EC countries. In 1960, 6.6 million (33 percent of the labor force) were employed in agriculture. By 1970 the number had dropped to about 3.7 million. As a result, wage rates in agriculture have been increasing but they are still less than half those paid by U.S. farmers.

# FOREWORD

The six countries of the European Community, or Common Market—Belgium-Luxembourg, France, Germany, Italy, and the Netherlands—make up the largest tobacco market in the world. The Community is also the largest for U.S. tobacco, taking a third of U.S. exports of all types of leaf in the year ending June 30, 1971.

The EC, in mid-1970, adopted a Common Agricultural Policy for tobacco. The CAP provides for guaranteed high prices, with no automatic production controls; a lucrative buyer's premium for purchasers of EC leaf; and an export subsidy and limitation on imports by a safeguard clause. Other provisions of the CAP relate to tax harmonization, monopolies, and trade preferences.

Higher prices to producers and lower prices to users of EC leaf, made possible by the CAP, have stimulated renewed interest in EC tobacco, especially in Italy, Belgium-Luxembourg, and Germany. Of the six EC countries, Italy is probably the one with the greatest potential for expanding production.

The CAP takes on even greater significance with the planned entry of the United Kingdom into the EC in 1973. Entry of the United Kingdom probably will speed up entry of the other three applicants: Denmark, Ireland, and Norway. The six EC countries plus the four applicants take about 60 percent of total U.S. tobacco exports.

This study reviews the development of tobacco production in Italy and attempts to analyze the effect of the raw tobacco CAP on future production and trade. It is based on a recent field trip by the author to the Italian producing and marketing areas and on official trade sources and various trade publications. The cooperation of Italian Government officials and members of the tobacco industry is greatfully acknowledged. Assistance from the U.S. Agricultural Attaché staff in Rome, especially Alberto Cacciaguerra, during visits to the production areas and with industry officials was invaluable.

Hugh C. Kiger, Director
Tobacco Division

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# ITALY'S CHANGING TOBACCO INDUSTRY

By Robert W. Johnson

The resource mix that has made Italy the world's largest wine producer is not the best for tobacco. Nevertheless the Italian Government has long promoted the crop as one method of solving the surplus labor situation. By the 1930's the country had become a net tobacco exporter and, except for a few postwar years, it remained one until the blue-mold disaster of 1961. Since then it has again been a net importer in every year except one.

The government apparently hopes a reversal of this trend will come through its partnership in the European Economic Community (EC). It looks forward to being a major supplier to the EC, which together make up the world's largest tobacco market.

The EC's Common Agricultural Policy for tobacco, which went into effect in mid-1970, is a step in this direction. It raised Italian flue-cured prices to the producer for his 1970 crop by 34 percent and burley prices 42 percent. At the same time, it reduced prices to manufacturers of Italian flue-cured 23 percent and burley 24 percent.

These two tobaccos are the major types the United States exports to the EC.

The higher prices to producers and lower prices to manufacturers are expected to bring about an increase in utilization outside Italy, especially for burley. In fact, burley production has been rising steadily since 1966 and exports were 83 percent higher in 1970-71 than in 1969-70. Burley quality is expected to continue to improve, and production could easily equal the EC's present burley consumption level of perhaps 120 million pounds.

Flue-cured has so far found little acceptance outside of Italy but with the incentive of lower prices to manufacturers made possible by the buyer's premium, a renewed interest of foreign buyers in Italian flue-cured tobacco is expected.

Fire-cured ("Kentucky"), the dominant type of tobacco prior to World War II, has been declining, but, with the incentives provided by the CAP, producers planted 26 percent more area to fire-cured in 1971 than in 1970. Production is expected to be up by about the same proportion.

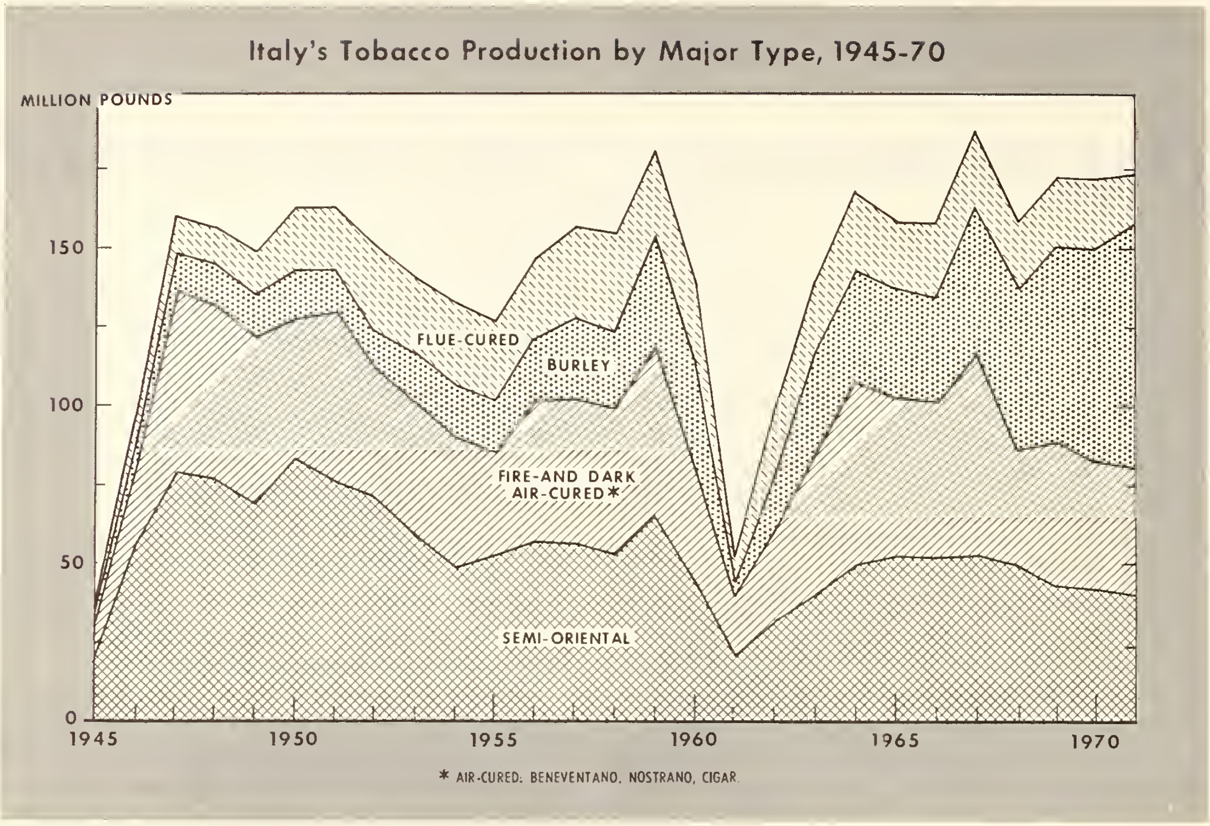
Production of semi-oriental and some other types of tobacco may decline. Under the CAP, the Italian Tobacco Monopoly's future purchases of these types will be limited to its needs and these needs probably will decline as the Monopoly produces better quality cigarettes to better meet consumer demand and more effectively compete in the EC market.

## PRODUCTION

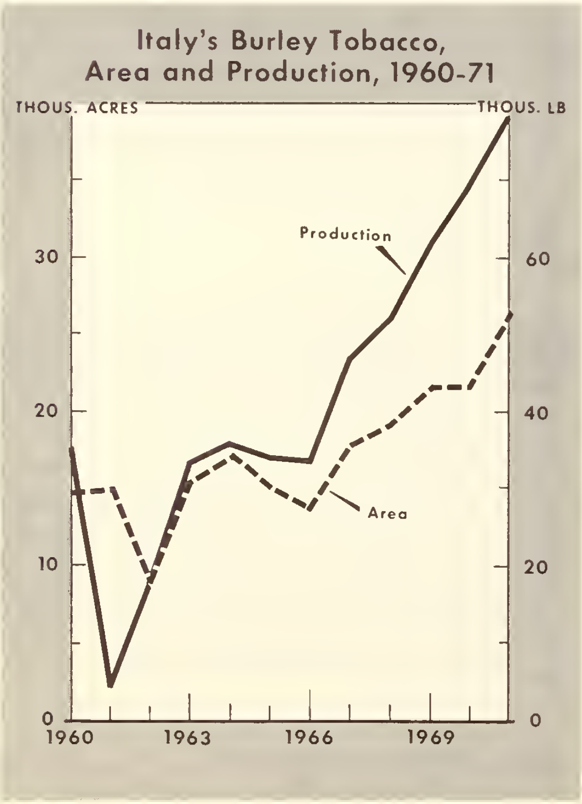
Prior to World War I, Italy produced less tobacco than it imported. Imports were primarily from the United States. After the war, however, the Italian Tobacco Monopoly adopted the policy of filling as much as possible of the country's tobacco requirement from the domestic crop. Production increased rapidly. By 1933, Italy had become a net tobacco exporter, and it remained one most years until the blue-mold disaster in 1961 reduced the crop to less than one-third the normal level. Since then it has been a net importer in every year except for one.

The groundwork for expansion of Italian tobacco production began in 1895 with the establishment of a tobacco experiment station at Scafati in south-central Italy. For a number of years this station did notable work in developing varieties of tobacco suitable to Italian conditions.

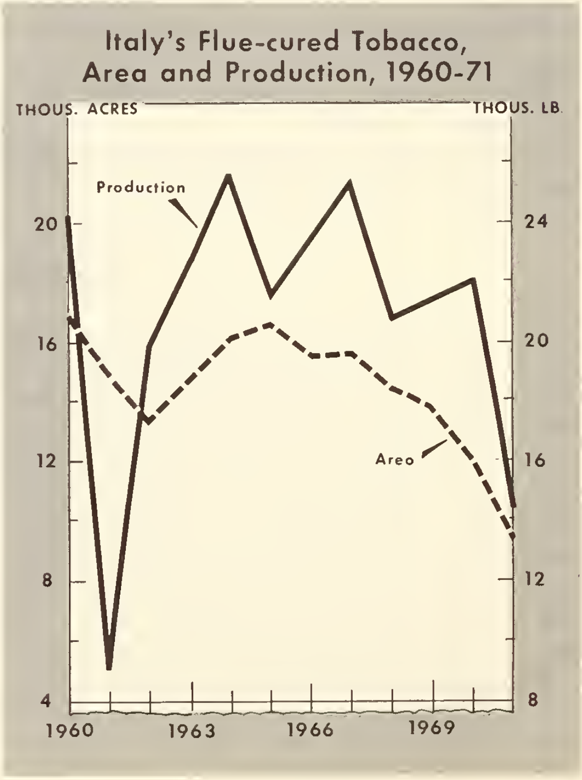
The crop reached 28 million pounds in 1920, 43 million in 1921, and 103 million in 1924. It stayed around 100 million until World War II when it dropped to a low of 39 million in 1945. After the war, production quickly jumped to about 175 million pounds and, except for the blue mold years of the early sixties, has stayed at about that level.



Italy's Tobacco Production by Major Type, 1945-70
MILLION POUNDS
150
100
50
0
1945
1950
1955
1960
1965
1970
FLUE-CURED
BURLEY
FIRE-AND DARK AIR-CURED*
SEMI-ORIENTAL
* AIR-CURED: BENEVENTANO, NOSTRANO, CIGAR.

Italy's Burley Tobacco, Area and Production, 1960-71
THOUS. ACRES
THOUS. LB
Production
Area
30
20
10
0
60
40
20
0
1960
1963
1966
1969

Italy's Flue-cured Tobacco, Area and Production, 1960-71
THOUS. ACRES
THOUS. LB.
Production
Areo
20
16
12
8
4
24
20
16
12
8
1960
1963
1966
1969

## Production By Type

Italy produces a wide variety of types of tobacco, from the major types found in the United States to semi-oriental to dark air-cured, fermented types.

"Kentucky" fire-cured, semi-oriental, and bright Italian flue-cured were the dominant types grown in Italy during the 4 years prior to World War II (1936-40). These types accounted for respectively 26, 22, and 18 percent of total production. Other types and their share of production were: Nostrano dark air-cured 8 percent, burley 8 percent, Maryland 6 percent, Beneventano dark air-cured 6 percent, and subtropical air-cured (cigar) 4 percent. The remaining 2 percent was composed of other dark air-cured, snuff, etc.

After the war when total production increased—it was 71 percent higher in 1950-54 than in 1936-39—the composition by type was virtually unchanged, and remained so until the blue-mold disaster of 1961 and 1962.

Production in 1961, less than one-third the level of the previous 14 years, regained its normal level by 1964, but the composition had changed substantially. Semi-oriental became the dominant type with 29 percent of the total. Burley, which made up only 9 percent in 1950-54, made up 26 percent of the total in 1965-69. Fire-cured, which had been the dominant type with 26 percent of the total in 1936-39, declined to 10 percent by 1965-69. Maryland declined from 6 percent in 1936-39 to 1 percent in 1965-69 and cigar declined from 4 percent to 1 percent. Flue-cured trended downward from 18 percent in 1936-39 to 15 percent in 1950-54 to 13 percent in 1965-69. Beneventano increased from 6 percent in 1936-39 to 9 percent in 1965-69. Nostrano remained about the same.

Flue-cured and burley are the major types which the United States exports to the EC market.

**Flue-cured.**—Flue-cured tobacco is produced in the north on irrigated land ranging in price from $800 to $1,600 per acre. With an average yield of 1,500 pounds per acre (compared with about 1,800 pounds in the United States), a farmer can gross about $890 per acre; with a good yield of 2,140 pounds, he can gross $1,260 per acre. Rent for irrigated land suitable for tobacco is about $70 per acre.

Competing crops in Umbria, Italy's major flue-cured area, are wheat and corn, with wheat accounting for the largest amount of cultivated land. Average yields on land suitable for tobacco are about 48 bushels per acre, which, at the market price of $2.97 per bushel, yields a gross return of $142 per acre. For corn, the average yield is about 138 bushels per acre, which, at the market price of $2.12, would return about $292 per acre.

Tobacco, wheat, and corn are all grown on level or nearly level land. Tobacco production is mechanized except for harvesting; wheat and corn production are mechanized for all operations. For this reason many farmers have preferred to grow wheat and corn, since labor has come to be in short supply in this area, where industrial jobs are available.

With the increase in producer prices for tobacco, farmers have a renewed interest in this crop. Many big farmers still prefer wheat or corn because of the lower labor cost, but a few are producing tobacco, using hired labor at a total cost, including social benefits, of about 72 cents per hour. Even so, the ratio of flue-cured price to labor cost is much more favorable to growers than in the United States.

**Burley.**—Burley is produced further south; the best quality and the largest quantity come from the fertile volcanic soil of the Campania region near Naples, in the vicinity of Mt. Vesuvius. The land is farmed so intensively that often a crop is planted between the rows of another crop about to be harvested.

The region benefits from the earliest harvest in the EC, and returns from vegetable growing are high. Tobacco, however, is still the favored crop.

Cropland in this area is all irrigated and all level, the mountains being too steep for farming. The land is worth $1,000 to $4,000 per acre, depending partly upon availability of irrigation water. Farms are small, very often less than an acre and almost never more than 30.

Farm wage rates, including social benefits, run about 60 U.S. cents per hour compared with 72 cents in the flue-cured area further north. There is said to be a rapid escalation in wage rates owing to the availability of some industrial jobs in this area, as well as the near certainty of better jobs in northern Italy or Germany. Still, the relationship of wage costs to price received is much more favorable for burley farmers in Italy than for those in the United States.

In addition, Italy's burley yields are much better than U.S. yields—about 3,000 pounds per acre, as against about 2,500 pounds in the United States. There is little doubt that production over the next several years could easily expand to meet the EC's present burley consumption level of perhaps 120 million pounds.

**Semi-oriental.**—Semi-oriental tobaccos in Italy are usually oriental crossed with light air-cured. Semi-oriental, or levantine, tobaccos were introduced into Italy in 1884 with varieties from eastern Balkan countries. Several years of selective breeding resulted in a number of varieties that bred true and could be called Italian.

Today there are three principal varieties, Xanti YaKa, Perustitza, and Erzegovina. They are grown primarily in the heel of Italy in the province of Puglia.

**Beneventano and Nostrano.**—Beneventano and Nostrano are dark air-cured types which are generally fermented for use in pipe blends and cigars.

Beneventano is a direct descendant of Brazilian seed imported into France by Thevet in 1556. Nostrano is the oldest "Italian" type. It is a hybrid whose cultivation in Italy probably dates from the 16th century.

Each of these types made up 9 percent of the tobacco cultivated in Italy in 1965-69.

Beneventano and Nostrano are produced chiefly in the southern Province of Campania, which includes Naples, and the northern Province of Veneto, which includes Venice. Campania is the leading Province for burley. Veneto is second most important for flue-cured.

**Maryland, fire-cured ("Kentucky"), and cigar.**—Maryland, fire-cured, and cigar tobacco production has been tending to decline both in absolute quantity and as a percentage of the total. Both Maryland and fire-cured are produced in regions of relative labor scarcity, and fire-cured requires considerable capital investment for curing barns. However, given the incentive of the buyer's premium and higher producer prices provided by the CAP (the EC's Common Agricultural Policy), producers planted 26 percent more area to fire-cured in 1971 than in 1970. Production is expected to increase.

The demand for cigar tobacco has been declining.

# CONSUMPTION

The same trend in utilization of leaf tobacco which has been occurring in the United States and other countries is occurring in Italy—i.e., utilization of leaf is declining while numbers of cigarettes produced are increasing. Utilization of leaf dropped from a peak of 155.1 million pounds in 1965 to 145.5 million in 1970. Part of this decline was due to a decline in smoking tobacco production and increased use of reconstituted tobacco. But most was due to increasing consumption of filter-tipped cigarettes which require less tobacco. Filter-tipped consumption, which was 1 percent of the total in 1956, increased to 13 percent in 1960 and 60 percent in 1970.

An interesting current trend in Italian cigarette production is the shift to brands using a higher proportion of good quality light cigarette tobaccos. A preference of many smokers for the American-type blended cigarette is indicated by problems the Italian Government has had with smuggled cigarettes. In order to combat smuggling and in order to more effectively compete in the EC markets, the Tobacco Monopoly is producing some blended-type cigarettes which use a large proportion of U.S. tobacco. Sales of these cigarettes have greatly exceeded expectations.

Manufacturers' utilization in 1969 was 148.1 million pounds of which 6.7 million was industrial use and loss. The remaining 141.4 million was

**Table 1.—Manufacturers' utilization of tobacco in Italy, 1969[1]**

| Type | Domestic | | U.S. | | Other imported | | Total | |
|---|---|---|---|---|---|---|---|---|
| | *Million pounds* | *Percent* | *Million pounds* | *Percent* | *Million pounds* | *Percent* | *Million pounds* | *Percent* |
| Flue-cured .... | 19.9 | 59 | 9.2 | 27 | 4.7 | 14 | 33.8 | 100 |
| Burley ....... | 28.8 | 87 | 4.1 | 12 | .2 | 1 | 33.1 | 100 |
| Semi-oriental .. | 36.4 | 88 | 0 | 0 | 4.8 | 12 | 41.2 | 100 |
| Cigar ........ | 5.2 | 95 | 0 | 0 | .3 | 5 | 5.5 | 100 |
| Other ........ | 25.1 | 90 | 0 | 0 | 2.7 | 10 | 27.8 | 100 |
| Total ..... | 115.4 | 82 | 13.3 | 9 | 12.7 | 9 | 141.4 | 100 |

[1] Does not include industrial use and loss.

Table 2.–Tobacco utilization and production of tobacco products in Italy, by year, 1958-70

| Year | Manufacturers' utilization | | Cigarettes | Cigars & cigarillos | Smoking tobacco |
|---|---|---|---|---|---|
| | *Metric tons* | *Million pounds* | *Billion pieces* | *Billion pieces* | *Million pounds* |
| 1958 .............. | 60,974 | 134.4 | 45.5 | 0.3 | 12.3 |
| 1959 .............. | 61,546 | 135.7 | 46.7 | .3 | 12.3 |
| 1960 .............. | 61,708 | 136.0 | 51.3 | .3 | 11.8 |
| 1961 .............. | 66,092 | 145.7 | 55.7 | .3 | 10.7 |
| 1962 .............. | 66,294 | 146.2 | 59.5 | .3 | 10.1 |
| 1963 .............. | 67,568 | 149.0 | 55.7 | .3 | 9.3 |
| 1964 .............. | 62,819 | 138.5 | 58.9 | .3 | 9.0 |
| 1965 .............. | 70,345 | 155.1 | 58.2 | .3 | 8.6 |
| 1966 .............. | 68,454 | 150.9 | 63.0 | .3 | 7.7 |
| 1967 .............. | 67,064 | 147.8 | 65.6 | .4 | 7.7 |
| 1968 .............. | 67,065 | 147.9 | 64.1 | .5 | 6.8 |
| 1969 .............. | 67,182 | 148.1 | 60.4 | .3 | 6.6 |
| 1970 .............. | 66,000 | 145.5 | 71.6 | 0 | 0 |

[1] Not available.

composed of 115.4 million pounds (82 percent) domestic leaf, 13.3 million (9 percent) U.S. leaf, and 12.7 million (9 percent) other imported leaf. Utilization data for 1971 will not be available for some time, but the proportion of U.S. leaf almost certainly will be up.

One factor which strongly affects the proportion of U.S. leaf is the battle over nicotine content of cigarettes. Italian tobacco is extremely low in nicotine, about 1.0-1.5 percent for burley and 0.5 percent for flue, and some smokers prefer this type of tobacco.

However, there seems to be a definite tendency of other smokers to prefer more full-bodied cigarettes made from higher nicotine, more flavorful U.S. tobacco.

The future of U.S. tobacco in the Italian and other markets will be largely decided by the outcome of this struggle between flavorful, high-nicotine cigarettes and less flavorful, low-nicotine cigarettes.

# TRADE

Italy was a large tobacco importer prior to the mid-1920's. Most imports were fire-cured tobacco from the United States. Imports then declined as domestic production increased, and by 1933 exports exceeded imports, as they did in most years until the 1960's when disease struck and the market and utilization pictures changed.

## Source Of Imports

The United States was the largest source of Italy's tobacco imports prior to the mid-1920's, accounting for 82 percent of total imports from 1910 to 1925. By then, domestic production had reached the relatively high level of about 100 million pounds—where it was to remain for the next 20 years—and imports declined substantially. Oriental tobacco made up the bulk of imports until 1969. These imports came mostly from Greece, Turkey, Bulgaria, and Yugoslavia.

In the 1960's imports again became larger than exports. This shift was brought about by (1) the blue-mold disaster of 1961, (2) increased demand for Italian tobacco in the German market, (3) a higher level of utilization, and (4) very strong sales of Italian-produced cigarettes containing a high proportion of U.S. tobacco.

In 1969 and 1970 the United States regained its dominant position in the Italian market. The purchase by the Italian Monopoly of 20 million pounds for 1971 delivery means the United States will maintain that position throughout 1971.

## Destination Of Exports

Prior to World War II—from 1923 to 1942—Poland, Germany, and Switzerland were the best markets for Italy's exported tobacco.

After the war, the United States also became an important market, taking from 2 million to 4 million pounds each year from 1949 to 1963, and the Netherlands joined as one of the leading markets.

Poland ceased to be important after 1950 and the United States after 1963. The Netherlands continued to be an important market through 1970 but West Germany took 71 percent of exports from 1965 to 1970.

Switzerland is presently the only other market of any importance, but virtually all of the tobacco exported to Switzerland is blended with other tobacco and returned to Italy in secret blends for preparing brands of cigarettes manufactured by the Monopoly under license. This tobacco exported to Switzerland is flue-cured.

Except for this flue-cured, virtually all of Italy's tobacco exports are burley. These exports have accounted for about one-third of the Italian burley crop during each of the past 6 years. As the burley crop has increased at the rate of about 10 percent per year, exports also have increased.

### Tobacco Products

Though data are not available to show it, Italian smokers probably acquired a taste for American blended-type cigarettes during World War II. Imports of cigarettes did not exceed 1 million pounds during the 5 years prior to World War II. After the war, imports increased from one-half million pounds in 1946 to an average of 5 million in 1963-65, 12 million in 1968, and 12 million again in 1969. West Germany has been the largest supplier. Other important suppliers are the Netherlands, Belgium-Luxembourg, Switzerland, and the United States.

Italy also exports some cigarettes. Exports were 439,000 pounds in 1967. France and Argentina were the most regular customers for Italian cigarettes in the 1920's and 30's. France and Somalia have been the best customers since World War II.

## EFFECTS OF CAP

The EC's Common Agricultural Policy for tobacco which went into effect in July 1970, after planting of the 1970 crop but prior to harvest provided: (1) "standard" (also called "objective" or "target") prices which were well above the prices received by producers during the 3 previous years; (2) intervention or support prices 10 percent below the level of the standard price; (3) buyer's premiums to firms or individuals who bought eligible EC leaf at above the intervention price; and (4) possible export subsidies and import controls. Other provisions relate to tax harmonization, monopolies, and trade preferences. No automatic production controls are provided. (See *Foreign Agriculture*, November 2, 1970.)

This CAP is expected to have a very substantial effect on the demand for and supply of Italian tobacco in the future. The effect will, to a large extent, be brought about through the changes the CAP has made in the marketing system.

### Marketing

The Italian Tobacco Monopoly has traditionally taken all usable tobacco which did not find an export market. Under the CAP, the Monopoly will no longer serve as a tobacco stabilization service. Beginning with the 1971 crop, it may buy any type of tobacco from any source. This is expected to bring about a drastic change in tobacco marketing in Italy.

Italian producers traditionally sold their tobacco to "concessionaires" on contract. The concessionaire furnished the farmer all or part of the fertilizer and other inputs needed and took all his crop. Some concessionaires specialized in exports, but most sold to the Monopoly all the tobacco they bought and processed. At one time there were 600 of them, but the number had fallen to about 400 by 1970.

Under the new CAP, anyone can buy tobacco from Italian farmers. The former concessionaires are now merely packers or processors. They have the choice of (1) buying at the intervention price and selling to the intervention agency, in which case they will not receive the buyer's premium, or (2) buying at more than the intervention price, receiving the buyer's premium, and finding a market for the tobacco.

Packers paid the standard price for most of the 1970-crop flue-cured and burley, and they will probably continue to pay at or near the standard price for future crops. Since standard prices are well above intervention prices, they will receive the buyer's premium; but then they must market the tobacco. Many packers not accustomed to marketing

will merge with others more experienced or go out of business.

Those who stay in business will buy only the types and qualities of tobacco which they know they can sell to a manufacturer—either the Italian Tobacco Monopoly or a foreign firm. Production of some types not in great demand will decline; that of other types will increase. In the process of transition, a surplus of about 20 million pounds, mostly of less desirable tobaccos, is expected to develop from the 1970 crop. In view of this, an even larger quantity from the 1971 crop may go into intervention.

## Prices

Flue-cured and burley are the types which are most competitive with U.S. exports to the EC.

As a result of the CAP, flue-cured prices were raised from an average of 44 U.S. cents per pound, farm sales weight, for the crops of 1967, 1968, and 1969 to 59 cents per pound for the 1970 crop (a 34-percent increase). Burley prices were raised from 36 cents for the three previous crops to 51 cents for the 1970 crop (a 42-percent increase).

These prices, which are average for the crop, are substantially below the CAP reference ("grade A") prices—also in farm sales weight—which, for flue-cured and burley, are based on top quality. Such price differentials offer increased incentives for Italian growers to produce better tobacco.

At the same time, prices to users of Italian tobacco were reduced, from about 77 cents per pound for the 1969 flue-cured crop to about 59 cents for the 1970 crop (23 percent) and from about 59 cents for the 1969 burley crop to about 45 cents for the 1970 crop (24 percent). These prices are for packed-weight tobacco.

Table 3.—Prices of Italy's 1970-crop flue-cured and burley tobacco
(Farm sales weight)

| Price category | Flue-cured | Burley |
|---|---|---|
| | *Cents per pound* | *Cents per pound* |
| Average price paid to producers | 59.0 | 50.8 |
| Buyer's premium | 33.7 | 30.4 |
| Intervention price: | | |
| Grade A (reference) | 67.9 | 58.2 |
| Grade B (65 percent of reference | 44.1 | 37.8 |
| Grade C (50 percent of reference for flue, 48 percent for burley) | 34.0 | 27.9 |
| Standard price: | | |
| Grade A (reference) | 75.4 | 64.6 |
| Grade B (65 percent of reference) | 49.0 | 42.0 |
| Grade C (50 percent of reference for flue, 48 percent for burley) | 37.7 | 31.0 |

The increase in prices to producers and the reduction in prices to users were both made possible by buyer's premiums of 34 U.S. cents per pound for flue-cured and 30 cents for burley. These premiums were paid to whoever purchased tobacco from producers at more than the intervention price. In Italy, the first buyers consisted of about 400 packers, who paid the standard price for most of the 1970 crop and thus were eligible for the buyer's premium.

For the 1971 crop, the buyer's premium for flue-cured was increased 18 percent—to 40 cents—and for burley it was reduced 5 percent, to 29 cents.

## Production

The major effect of the higher prices to producers and the lower prices to manufacturers was on Italian burley production. Burley was already on the uptrend; in anticipation of the CAP, Italy had been gearing for greater output, and production had been rising about 10 percent per year since 1966. Burley production was up 19 percent in 1969, 11 percent in 1970, and was expected to rise 14 percent in 1971. Both the area planted to fire-cured ("Kentucky") and production of this type jumped about 26 percent in 1971 over 1970. Production of this type had been trending downward since about 1950.

Production of other types may decline.

## Exports

Most of Italy's tobacco exports are burley, and they are on the increase. Exports in 1971, which come primarily from the 1970 crop, are expected to

Table 4.—Italian burley tobacco exports[1], 1965-1971

| Exports[2] | | Exports as percent of production[2] | Increase in exports from previous year |
|---|---|---|---|
| | *1,000 pounds* | *Percent* | *Percent* |
| 1965 | 6,500 | 18 | |
| 1966 | 11,000 | 33 | 69 |
| 1967 | 11,500 | 34 | 5 |
| 1968 | 12,000 | 26 | 4 |
| 1969 | 15,000 | 29 | 25 |
| 1970 | 16,000 | 26 | 7 |
| 1971 (est) | 22,000 | 32 | 38 |

[1] Estimated. Virtually all burley exports are to Germany.
[2] Assumes exports in CY 1965 came from the 1964 crop, etc.

be 22 million pounds—a 38-percent increase from 1970. Statistics for 1970-71 show exports of 24.2 million pounds, 83 percent above the 13.2 million pounds exported in 1969-70.

Approximately 20 million pounds, mostly of less desirable tobacco such as semi-oriental, is expected to accumulate as surplus from the 1970 crop and an even larger quantity may accumulate from the 1971 crop. Attempts probably will be made to dispose of this tobacco with a subsidy provided by the CAP.

# OUTLOOK

Italian burley tobacco production is expected to continue to increase, given the incentives provided by the Common Agricultural Policy. The quality of Italy's burley will improve, making it more and more competitive with U.S. burley. Without a change in the CAP, Italian burley could eventually replace most if not all U.S. and other burley in the EC market.

The reduction in the buyer's premium for the 1971 burley crop, from 30 to 29 cents per pound, probably will have little effect on burley sales. A 30-cent-per-pound premium for burley had already made possible a reduction in the price to the manufacturer from 59 cents per pound in 1967-69 to 45 cents in 1970 (a 24-percent reduction). A 45-cent price was such a good buy that, even if the full effect of the one-cent-per-pound premium reduction is passed on in terms of higher prices to the manufacturer, an increase from 45 to 46 cents per pound probably would have little effect on sales.

Italian flue-cured production also may increase, but Italian flue is not expected to be as competitive with high-quality U.S. tobacco as is Italian burley. The increase in the buyer's premium for the 1971 flue-cured crop from 34 to 40 cents per pound probably will be passed on to the buyer which will have some effect on encouraging greater utilization and production of flue-cured.

Production of fire-cured ("Kentucky") is expected to be 26 percent higher in 1971 than in 1970—about the same increase as in acreage. This type of tobacco is produced in areas of greater industrialization and higher labor cost, and production has been declining since about 1950. Perhaps the incentives provided by the CAP have reversed this downtrend.

Production of some other types of tobacco could decline. These types have been completely dependent on the Italian Tobacco Monopoly for a market. Under the CAP, the Monopoly has been relieved of the responsibility of serving as a stabilization agency. That function has now been taken over by the Italian Government agency for intervention in the agricultural product market (AIMA). The Monopoly will continue to take some of the less desirable Italian tobaccos. But the Monopoly is producing some higher quality cigarette brands in order to compete with other EC brands. In the future, it will take only what it needs for traditional cigarette brands and for low-priced filler tobacco.

The balance of the crop of these tobaccos may be sold to AIMA at the intervention price or it must find a market outside of Italy. About 20 million pounds from the 1970 crop and perhaps more from the 1971 crop will be sold to AIMA and probably will be exported with a subsidy. AIMA will pay for this tobacco only the intervention price which is said not to be satisfactory to producers. If true, producers, in the future, can be expected to produce only the amount of these types which they can sell at above the intervention price.

Though buyers who pay above the intervention price receive the buyer's premium, they must find a market for the tobacco. These less desirable types have not found a market outside of Italy in the past. Unless the lower export prices made possible by the buyer's premium and an export subsidy make them more attractive, their future production probably will be limited to whatever reduced quantity the Monopoly is willing to take.

The EC Commission has proposed an average 5-percent increase in standard and intervention prices for the 1972 EC crop. The proposed price for Italian burley was increased only 2 percent. Italian flue-cured and fire-cured prices were increased 8 percent. Since the CAP includes no effective production control measures, these higher guaranteed prices would further stimulate EC tobacco output.

# STATISTICAL APPENDIX

Tobacco production in Italy by type, selected averages 1936-39 and 1945-69, annual 1945-71

| Year | Flue-cured | | | Burley | | | Maryland | | | Fire-cured | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* |
| 1936-39 av. | 2,000 | 3.800 | 1,900 | 2,100 | 4,600 | 2.190 | 1.200 | 3,400 | 2.833 | 24,900 | 42,100 | 1,691 |
| 1945 | 1,757 | 2,036 | 1,159 | 1,615 | 2,185 | 1,353 | 722 | 616 | 853 | 14.971 | 13,877 | 928 |
| 1946 | 4,660 | 7,150 | 1.534 | 4,500 | 6,857 | 1,524 | 1,774 | 2,528 | 1,425 | 30,840 | 39,345 | 1,276 |
| 1947 | 6,178 | 12,125 | 1,963 | 5,725 | 12,093 | 2,112 | 2,607 | 6,351 | 2,436 | 37,935 | 54,210 | 1,429 |
| 1948 | 6,708 | 11,341 | 1,691 | 6.220 | 13.241 | 2,129 | 2,758 | 7,299 | 2,646 | 39,536 | 51,885 | 1,312 |
| 1949 | 8.157 | 14,775 | 1,811 | 5,916 | 13,757 | 2,325 | 2,552 | 6.621 | 2,594 | 36,853 | 47,920 | 1.300 |
| 1945-49 av. | 5,492 | 9,485 | 1,727 | 4,795 | 9,627 | 2,008 | 2,083 | 4,663 | 2,238 | 32,027 | 41,447 | 1,294 |
| 1950 | 9,214 | 19,460 | 2,112 | 6,390 | 16,082 | 2,517 | 3,417 | 9,116 | 2.668 | 38,357 | 56,043 | 1,461 |
| 1951 | 10,848 | 21.280 | 1,962 | 5,834 | 13,011 | 2,230 | 3,815 | 9,397 | 2,463 | 33,833 | 47,372 | 1,400 |
| 1952 | 12,324 | 26,203 | 2.126 | 5,330 | 13,144 | 2,466 | 3,825 | 9,464 | 2,474 | 26,583 | 40,841 | 1,536 |
| 1953 | 14,164 | 24.492 | 1,729 | 6,462 | 14,934 | 2,311 | 3,865 | 9,667 | 2,501 | 21,048 | 30,474 | 1,448 |
| 1954 | 14,700 | 26,340 | 1,792 | 6,785 | 16,691 | 2,460 | 3,138 | 7,924 | 2,525 | 17,411 | 24,189 | 1,389 |
| 1950-54 av. | 12,250 | 23,555 | 1,923 | 6,160 | 14.772 | 2,398 | 3,612 | 9,114 | 2,523 | 27,446 | 39,784 | 1.450 |
| 1955 | 14,929 | 26,367 | 1,766 | 7,917 | 16.515 | 2,086 | 3.316 | 7,068 | 2,131 | 18,580 | 26,396 | 1,421 |
| 1956 | 14,549 | 27,190 | 1,869 | 8.075 | 19.390 | 2,401 | 3,615 | 10,076 | 2,787 | 19,753 | 29,533 | 1,495 |
| 1957 | 15,031 | 30,049 | 1,999 | 9,415 | 25,573 | 2,716 | 4,186 | 12,522 | 2,991 | 18,992 | 29,696 | 1,564 |
| 1958 | 17,015 | 31,570 | 1,855 | 10,487 | 23.986 | 2,287 | 4,789 | 12,456 | 2,601 | 21,658 | 31,812 | 1,469 |
| 1959 | 16,748 | 26,160 | 1,562 | 13,378 | 36.726 | 2,745 | 4,954 | 17,198 | 3,472 | 17,678 | 28,896 | 1,635 |
| 1955-59 av. | 15,654 | 28,267 | 1,806 | 9,854 | 24,438 | 2,480 | 4,172 | 11,864 | 2,844 | 19,332 | 29,266 | 1.514 |
| 1960 | 17,015 | 24,151 | 1,419 | 14,505 | 35,000 | 2,413 | 4,213 | 14,356 | 3,408 | 15,370 | 19,021 | 1,238 |
| 1961 | 14,791 | 9,167 | 620 | 14,816 | 4,495 | 303 | 3,862 | 1,058 | 274 | 11,448 | 9,034 | 789 |
| 1962 | 13,398 | 19,879 | 1,484 | 9,093 | 17,679 | 1,944 | 1,169 | 3,093 | 2,646 | 10,151 | 15,496 | 1,527 |
| 1963 | 14,740 | 22.740 | 1,543 | 15,202 | 32,818 | 2,159 | 1,105 | 2,685 | 2,430 | 13,679 | 18,150 | 1,327 |
| 1964 | 16.012 | 25,434 | 1,588 | 16,734 | 35,404 | 2,116 | 2,147 | 5,961 | 2,776 | 14,282 | 20,174 | 1,413 |
| 1960-64 av. | 15,191 | 20,274 | 1,335 | 14,070 | 25,079 | 1,782 | 2,499 | 5,431 | 2,173 | 12.986 | 16,375 | 1,260 |
| 1965 | 16.526 | 21,537 | 1,303 | 16,338 | 33,757 | 2,066 | 1,530 | 3,126 | 2,043 | 14,193 | 18,607 | 1,311 |
| 1966 | 16,556 | 23,378 | 1,503 | 13,667 | 33,717 | 2,467 | 1,090 | 2,740 | 2,514 | 13,114 | 18,294 | 1,395 |
| 1967 | 15,580 | 25,280 | 1,623 | 17,371 | 46,788 | 2,693 | 924 | 2,696 | 2,918 | 12,375 | 19,076 | 1,541 |
| 1968 | 14,371 | 20,736 | 1,443 | 19,014 | 51,773 | 2,726 | 294 | 761 | 2,588 | 11,495 | 16,982 | 1,477 |
| 1969 | 13,798 | 21,460 | 1,673 | 21,592 | 61,799 | 3,087 | 210 | 403 | 2,108 | 10,959 | 15,567 | 1,465 |
| 1965-69 av. | 15,166 | 22,478 | 1,482 | 17,596 | 45,567 | 2,590 | 810 | 1,945 | 2,401 | 12,427 | 17,705 | 1,425 |
| 1970 | 12,019 | 22,046 | 1,834 | 21,599 | 68,784 | 3,185 | 89 | 220 | 2,472 | 10,803 | 16,975 | 1,571 |
| 1971 est | 9,363 | 14,389 | 1,537 | 26,343 | 78,605 | 2,984 | 274 | 536 | 1,956 | 13,590 | 21,746 | 1,600 |

Tobacco production in Italy by type, selected averages 1936-39 and 1945-69, annual 1945-71—Con.

| Year | Semi-oriental | | | Beneventano | | | Nostrano | | | Cigar | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* | *Acres* | *1,000 pounds* | *Pounds per acre* |
| 1936-39 av. | 43,800 | 29,300 | 669 | 3,200 | 4,300 | 1,344 | 2,300 | 3,500 | 1,522 | 1,000 | 1,600 | 1,600 |
| 1945 | 29,259 | 11,519 | 394 | 1,490 | 908 | 609 | 2,416 | 2,290 | 948 | 2,995 | 3,090 | 1,032 |
| 1946 | 50,280 | 26,795 | 533 | 3,281 | 2,517 | 767 | 3,361 | 4,101 | 1,220 | 6,904 | 9,400 | 1,362 |
| 1947 | 75,017 | 57,207 | 763 | 4,804 | 6,092 | 1,268 | 3,457 | 4,618 | 1,336 | 9,150 | 13,995 | 1,530 |
| 1948 | 69,690 | 54,822 | 787 | 6,449 | 7,182 | 1,114 | 4,415 | 5,875 | 1,331 | 7,823 | 11,691 | 1,494 |
| 1949 | 66,250 | 52,867 | 798 | 5,389 | 4,738 | 879 | 4,700 | 7,233 | 1,539 | 5,750 | 8,299 | 1,443 |
| 1945-49 av. | 58,099 | 40,642 | 700 | 4,283 | 4,287 | 1,001 | 3,670 | 4,823 | 1,314 | 6,524 | 9,295 | 1,425 |
| 1950 | 67,878 | 45,307 | 667 | 6,909 | 8,047 | 1,165 | 5,765 | 9,724 | 1,687 | 5,308 | 8,517 | 1,025 |
| 1951 | 67,938 | 54,326 | 800 | 7,534 | 9,917 | 1,316 | 6,696 | 10,377 | 1,550 | 4,880 | 7,471 | 1,531 |
| 1952 | 62,178 | 41,225 | 663 | 7,270 | 7,708 | 1,060 | 7,902 | 14,682 | 1,858 | 4,280 | 7,273 | 1,699 |
| 1953 | 57,752 | 43,625 | 755 | 7,310 | 9,241 | 1,264 | 8,453 | 12,461 | 1,474 | 3,946 | 5,537 | 1,403 |
| 1954 | 54,510 | 40,680 | 746 | 7,267 | 7,937 | 1,092 | 7,707 | 11,905 | 1,545 | 3,420 | 4,865 | 1,423 |
| 1950-54 av. | 62,051 | 45,033 | 726 | 7,218 | 8,570 | 1,187 | 6,705 | 11,830 | 1,764 | 4,367 | 6,733 | 1,542 |
| 1955 | 55,790 | 32,176 | 578 | 18,745 | 25,320 | 1,351 | (1) | (1) | (1) | 297 | 419 | 1,411 |
| 1956 | 55,946 | 44,713 | 800 | 16,082 | 21,894 | 1,361 | (1) | (1) | (1) | 2,965 | 4,694 | 1,583 |
| 1957 | 59,640 | 46,429 | 778 | 18,181 | 25,470 | 1,401 | (1) | (1) | (1) | 497 | 743 | 1,495 |
| 1958 | 63,769 | 47,553 | 746 | 11,706 | 18,541 | 1,584 | (1) | (1) | (1) | 744 | 1,102 | 1,481 |
| 1959 | 64,157 | 53,876 | 840 | 21,213 | 33,944 | 1,600 | (1) | (1) | (1) | 1,016 | 1,541 | 1,517 |
| 1955-59 av. | 59,860 | 44,949 | 751 | 17,185 | 25,034 | 1,457 | (1) | (1) | (1) | 1,104 | 1,700 | 1,540 |
| 1960 | 57,868 | 36,116 | 624 | 9,078 | 7,610 | 838 | 10,909 | 14,434 | 1,323 | 1,299 | 1,698 | 1,307 |
| 1961 | 51,926 | 17,943 | 346 | 6,795 | 203 | 29 | 8,752 | 9,621 | 1,099 | 1,290 | 1,292 | 1,002 |
| 1962 | 43,579 | 29,416 | 675 | 2,298 | 2,275 | 990 | 6,941 | 12,057 | 1,737 | 1,287 | 1,504 | 1,169 |
| 1963 | 60,159 | 44,866 | 746 | 5,607 | 6,940 | 1,238 | 7,991 | 13,126 | 1,643 | 1,159 | 1,731 | 1,494 |
| 1964 | 64,140 | 58,669 | 915 | 7,994 | 8,990 | 1,125 | 9,321 | 17,626 | 1,891 | 1,616 | 2,601 | 1,610 |
| 1960-64 av. | 55,535 | 37,402 | 673 | 6,354 | 5,204 | 819 | 8,782 | 13,373 | 1,523 | 1,330 | 1,765 | 1,327 |
| 1965 | 64,189 | 50,891 | 793 | 11,819 | 13,893 | 1,175 | 11,411 | 17,280 | 1,514 | 1,665 | 2,661 | 1,598 |
| 1966 | 63,033 | 49,751 | 789 | 13,405 | 14,641 | 1,092 | 10,699 | 16,049 | 1,500 | 2,083 | 2,465 | 1,199 |
| 1967 | 61,029 | 64,160 | 1,051 | 14,487 | 16,041 | 1,107 | 10,116 | 16,049 | 1,586 | 1,097 | 1,497 | 1,365 |
| 1968 | 58,293 | 37,602 | 639 | 13,927 | 17,769 | 1,276 | 9,778 | 13,483 | 1,379 | 645 | 1,089 | 1,289 |
| 1969 | 46,408 | 47,128 | 963 | 14,107 | 13,541 | 960 | 8,238 | 13,717 | 1,665 | 673 | 922 | 1,530 |
| 1965-69 av. | 58,590 | 49,906 | 852 | 13,549 | 15,177 | 1,120 | 10,048 | 15,316 | 1,524 | 1,311 | 1,727 | 1,317 |
| 1970 | 45,152 | 40,565 | 898 | 12,355 | 13,228 | 1,071 | 7,413 | 9,921 | 1,338 | 274 | 441 | 1,609 |
| 1971 | 47,868 | 40,726 | 851 | (2) | (2) | (2) | (2) | (2) | (2) | 437 | 668 | 1,529 |

[1] Included with Beneventano.
[2] Not available.

Italy's tobacco production, imports, and exports, averages 1910-69, annual 1945-71

| Year | Domestic production | Imports | Imports from U.S. | Exports |
|---|---|---|---|---|
| Average: | *1,000 pounds* | *1,000 pounds* | *1,000 pounds* | *1,000 pounds* |
| 1910-14 | 21,592 | 46,084 | 38,425 | 3,200 |
| 1915-19 | 19,054 | 47,558 | 41,298 | 4,222 |
| 1920-24 | 58,790 | 52,802 | 39,983 | 925 |
| 1925-29 | 91,291 | 16,165 | 6,900 | 7,333 |
| 1930-34 | 106,223 | 7,967 | 2,220 | 8,621 |
| 1935-39 | 95,511 | 5,252 | 513 | 12,927 |
| 1940-44 | 85,986 | [1] 7,066 | [1] 2,968 | [1] 28,533 |
| 1945-49 | 125,609 | [2] 16,581 | [2] 7,575 | [2] 5,973 |
| 1950-54 | 160,146 | 8,291 | 1,318 | 22,680 |
| 1955-59 | 168,220 | 18,168 | 1,824 | 26,849 |
| 1960-64 | 125,595 | 45,100 | 9,990 | 28,778 |
| 1965-69 | 169,458 | 22,546 | 7,822 | 14,549 |
| Annual: | | | | |
| 1945 | 39,103 | (3) | (3) | (3) |
| 1946 | 98,186 | 819 | 151 | 468 |
| 1947 | 168,430 | 29,826 | 17,989 | 3,848 |
| 1948 | 164,077 | 27,384 | 10,220 | 4,134 |
| 1949 | 158,249 | 8,293 | 1,940 | 15,442 |
| 1950 | 173,397 | 9,057 | 2,328 | 21,619 |
| 1951 | 174,826 | 5,559 | 0 | 17,245 |
| 1952 | 161,007 | 4,316 | 0 | 17,398 |
| 1953 | 150,649 | 8,180 | 2,855 | 27,400 |
| 1954 | 140,852 | 14,340 | 1,409 | 29,738 |
| 1955 | 134,260 | 23,696 | 5,272 | 25,164 |
| 1956 | 157,490 | 15,668 | 147 | 26,874 |
| 1957 | 171,121 | 18,373 | 1,142 | 27,397 |
| 1958 | 179,168 | 16,433 | 2,562 | 28,518 |
| 1959 | 199,060 | 16,670 | 0 | 26,292 |
| 1960 | 153,824 | 18,242 | 3,484 | 29,614 |
| 1961 | 53,351 | 17,662 | 6,097 | 36,638 |
| 1962 | 102,117 | 76,660 | 13,756 | 41,685 |
| 1963 | 143,731 | 62,856 | 18,694 | 24,642 |
| 1964 | 174,952 | 50,082 | 7,919 | 11,309 |
| 1965 | 161,934 | 22,663 | 5,258 | 8,529 |
| 1966 | 161,169 | 15,072 | 4,169 | 14,475 |
| 1967 | 191,657 | 22,727 | 6,841 | 14,832 |
| 1968 | 159,073 | 13,483 | 6,451 | 15,508 |
| 1969 | 173,458 | 38,784 | 16,389 | 19,400 |
| 1970 | 173,061 | 37,072 | 14,104 | 24,505 |
| 1971 est | 175,266 | (3) | (3) | (3) |

[1] 3-year average. War years.
[2] 4-year average.
[3] Not available.

## Italy's tobacco exports by country of destination, 1965-70

| Country of destination | 1965 | | 1966 | | 1967 | | 1968 | | 1969 | | 1970 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *1,000 lbs.* | *1,000 dol.* | *1,000 lbs.* | *1,000 dol.* | *1,000 lbs.* | *1,000 dol.* | *1,000 lbs.* | *1,000 dol.* | *1,000 lbs.* | *1,000 dol.* | *1,000 lbs.* | *1,000 dol.* |
| Belgium-Luxembourg | 80 | (1) | 47 | 63 | 93 | 118 | 154 | 195 | 130 | 184 | (1) | (1) |
| Germany, West[2] | 6,122 | 5,703 | 10,678 | 6,786 | 10,883 | 6,284 | 11,439 | 7,630 | 14,270 | 8,476 | 15,761 | 9,110 |
| Netherlands[3] | 586 | 1,252 | 1,526 | 810 | 1,620 | 1,097 | 1,327 | 730 | 1,861 | 1,183 | 2,862 | 1,823 |
| Denmark | 55 | 194 | 21 | 80 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Sweden | 41 | (1) | 54 | 332 | 13 | 37 | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland[4] | 1,384 | 1,443 | 993 | 1,290 | 1,405 | 1,198 | 1,990 | 1,458 | 2,702 | 1,684 | 4,912 | 3,081 |
| United Kingdom | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 172 | 121 | 0 | 0 |
| United States | 0 | 0 | 862 | 651 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Germany, East | 218 | 351 | 251 | 172 | 454 | 574 | 566 | 454 | 0 | 0 | 0 | 0 |
| Libya | 0 | 0 | 37 | 17 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Spain | 0 | 0 | 0 | 0 | 331 | 397 | 0 | 0 | 0 | 0 | 0 | 0 |
| Southern Yemen | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 243 | 238 | 0 | 0 |
| Other countries | 22 | 80 | 6 | 16 | 33 | 46 | 33 | 49 | 22 | 39 | 970 | 561 |
| Total | 8,508 | 9,023 | 14,475 | 10,217 | 14,832 | 9,751 | 15,509 | 10,516 | 19,400 | 11,925 | 24,505 | 14,575 |
| | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | |
| Av. price per lb. | 1.06 | | 0.71 | | 0.66 | | 0.68 | | 0.61 | | 0.59 | |

[1] Not available.
[2] Virtually all exports to West Germany are burley tobacco.
[3] Part burley and part cigar tobacco.
[4] All flue-cured.

## Italy's tobacco imports by country of origin, 1965-70

| Country of origin | 1965 | | 1966 | | 1967 | | 1968 | | 1969 | | 1970 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | *1,000 lb.* | *1,000 dol.* | *1,000 lb.* | *1,000 dol.* | *1,000 lb.* | *1,000 dol.* | *1,000 lb.* | *1,000 dol.* | *1,000 lb.* | *1,000 dol.* | *1,000 lb.* | *1,000 dol.* |
| United States | 5,258 | 3,913 | 4,169 | 2,978 | 6,841 | 6,183 | 6,450 | 5,728 | 16,389 | 16,274 | 14,104[1] | 14,391 |
| Brazil | 2,823 | 1,121 | 364 | 140 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Bulgaria | 1,739 | 1,170 | 1,178 | 1,177 | 1,183 | 1,044 | 395 | 213 | 0 | 0 | 0 | 0 |
| Yugoslavia | 1,239 | 758 | 262 | 156 | 0 | 0 | 300 | 190 | 0 | 0 | 0 | 0 |
| Greece | 3,930 | 2,746 | 4,515 | 3,086 | 5,874 | 4,755 | 1,868 | 1,365 | 5,940 | 4,757 | 3,881[2] | 3,252 |
| Indonesia | 2,028 | 1,084 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Philippines | 3,560 | 1,019 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Rhodesia | 534 | 211 | 429 | 182 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Switzerland | 1,040 | 1,042 | 2,067 | 2,039 | 3,774 | 3,932 | 2,945 | 3,095 | 7,636 | 8,099 | 5,135[3] | 5,309 |
| Turkey | 29 | (4) | 1,585 | 995 | 3,065 | 2,219 | 447 | 333 | 2,801 | 2,422 | 3,178[2] | 2,334 |
| Korea, Republic of | 0 | 0 | 0 | 0 | 0 | 0 | 836 | 347 | 0 | 0 | 0 | 0 |
| Argentina | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 935 | 394 |
| Other countries | 483 | 137 | 503 | 187 | 1,990 | 878 | 241 | 51 | 6,018 | 3,134 | 9,808 | 5,019 |
| Total | 22,663 | 13,201 | 15,072 | 10,940 | 22,727 | 19,011 | 13,482 | 11,322 | 38,784 | 34,686 | 37,041 | 30,699 |
| | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | | *Dol.* | |
| Av. price per lb. | 0.58 | | 0.73 | | 0.84 | | 0.84 | | 0.89 | | 0.83 | |

Statistica Mensile Del Commercio Con L'Estero.

[1] About one-half flue and one-half burley.
[2] All oriental.
[3] Secret blended tobacco.
[4] Not available.

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